Treasury Acquisition Institute

Fiscal Year 2005 Training Catalog

Phone: (202) 283-1674/1292
Fax: (202) 283-1130/1517

Intranet: http://awss.procurement.irs.gov/tai
Internet: http://www.irs.gov
(located under Business Opportunities/IRS Procurement)

Dear Treasury Acquisition Institute (TAI) Customer:

The TAI staff would like to thank you for your continued support. As our valued customer, we will continue to listen to your needs, provide you with professional service, and deliver high quality training solutions. We are committed to assisting you in your efforts to achieve outstanding performance and career success!

We are pleased to present this year's catalog with a greater variety of course offerings designed with the needs of the Treasury Acquisition Professional in mind. The FY 2005 Catalog offers training in several key areas designed to develop well-rounded, world-class acquisition professionals. These areas include:

- **Contracting**
- **Specialized Acquisition**
- **Business Analysis**
- **Personal Development**

- **Project Management**
- **Advanced Project Management**
- **Contracting Officer's Technical Representative**

We welcome your continued input to our program and hope that you will let us know how we may better serve you. We look forward to seeing you at the TAI and continuing our partnership in helping you achieve your professional success.

Sincerely,

Nick Nayak, Chief Learning Officer
Sylvia Ball, Assistant Program Manager
Jodi Stark, Procurement Analyst
Diana Allison, Management & Program Analyst
Shonda Yates, Management & Program Analyst
Donald Guy, Management & Program Analyst

TREASURY ACQUISITION INSTITUTE
FISCAL YEAR 2005 TRAINING CATALOG

TABLE OF CONTENTS

SECTION 1

PROGRAM OVERVIEW

TREASURY ACQUISITION INSTITUTE OVERVIEW

   The Treasury Acquisition Institute (TAI) was established by the Department of the Treasury and the Internal Revenue Service in partnership with the other Treasury Bureaus on September 14, 1993. TAI was created to coordinate and lead Departmental and Bureau efforts to obtain the best training possible for their acquisition professionals.

   Since commencement, other Federal agencies and organizations have participated in the TAI training program. The current mission of TAI is to obtain cost-effective training solutions to ensure that all participating agencies and organizations receive the finest acquisition training to develop world-class acquisition professionals.

   The following is a list of organizations that TAI has served:

Architect of the Capitol
Architectural and Transportation Barriers Compliance Board
Bureau of Alcohol, Tobacco, and Firearms
Bureau of Engraving and Printing
Bureau of the Census
Bureau of the Public Debt
D.C. Department of Administrative Services
Department of Agriculture
Department of Army
Department of Commerce
Department of Homeland Security
Department of Justice
Department of Labor
Department of Navy
Environmental Protection Agency
Executive Office of the President
Federal Emergency Management Agency
Federal Law Enforcement Training Center
Federal Reserve Board
Federal Transit Administration
Financial Management Service
General Accounting Office
Homeland Security
National Credit Union Administration
National Gallery of Art
National Oceanic and Atmospheric Administration
Office of the Comptroller of the Currency
Office of Thrift Supervision
Pension Benefit Guaranty Corporation
Small Agency Council
Treasury Departmental Offices
U.S. Coast Guard
U.S. Customs Service
U.S. Mint
U.S. Patent and Trademark Office
U.S. Secret Service
U.S. Securities and Exchange Commission

SECTION 2

GENERAL INFORMATION

ABOUT OUR CATALOG

This Fiscal Year 2005 Training Catalog contains descriptions of courses in federal contracting, specialized acquisition, business analysis, project management and personal development training. We offer results-oriented courses and a professional training environment. Clear and exciting presentations, practical examples and enriching course materials, all help to reinforce major teaching points. Our instructors encourage class discussion and participation to create an environment in which students can learn through sharing and evaluating their experiences.

TAI POINTS OF CONTACT

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TAI COURSE TIMES

All courses held at TAI in Oxon Hill are from 8:30 am to 4:00 pm unless otherwise noted on the bottom left-hand corner of the confirmed TAI Registration Form.

HOW TO REGISTER

Registration is a simple, 3-step process:

1. Complete the registration form on the last page of this catalog. IRS employees with access to the Intranet can download the registration form located at:
   http://awss.procurement.irs.gov/tai/coursecatalog.htm
2. Have your supervisor indicate approval to attend the session by signing the form.
3. Fax or mail your completed registration form to us. Our fax number is (202) 283-1130. Our mailing address is:

   Internal Revenue Service
   Constellation Centre
   6009 Oxon Hill Road
   A:P:P – 1st Floor
   Oxon Hill, MD 20745
   Attn: Diana Allison

If you have questions or need additional information, please call (202) 283-1674.

GENERAL INFORMATION

REGISTRATION CONFIRMATION

You should receive a confirmation within three days of our receipt of your request. If you do not receive a fax or e-mail confirmation within three days, please call Diana Allison at (202) 283-1674. Individuals are responsible for making their own travel arrangements. However, no travel arrangements should be made until you receive your fax or e-mail confirmation of registration.

WITHDRAWAL/SUBSTITUTION/CANCELLATION POLICIES

1.   If you are unable to attend a class for which you are confirmed, send us a note with your supervisor's signature two weeks before the class start date.

2.   If your office wishes to substitute a participant, the substitute participant must complete a registration form. Send us the registration form with a note indicating for whom the participant is substituting. Substitutions are allowed up to the class start date.

3.   If TAI has to cancel a course for administrative reasons, we will make every effort to notify all confirmed participants. When we contact you, we will be happy to discuss enrolling you in a future session.

WAITING LIST

Because of the popularity of our program, many of our courses do fill quickly. When we notify you that the session you requested is full, please let us know if you are interested in being placed on the waiting list. If space becomes available we will contact you.

DRESS POLICY FOR CLASS

The dress policy is casual business attire (no shorts). For your comfort we suggest you bring a jacket or sweater.

REASONABLE ACCOMODATIONS

If you have special needs, please contact TAI. We will make every effort to accommodate your request.

ATTENDANCE

You are expected to attend all sessions of the course. If you have to be absent from any portion of the course, notify your supervisor, instructor, and a TAI staff member. Significant absences from the classroom may be reported to your supervisor and may result in your not receiving a certificate of completion.

TRAINING CERTIFICATE

Students who successfully complete training will receive a certificate of completion.

GENERAL INFORMATION

RECEIVING MESSAGES DURING CLASS HOURS

Messages for students attending class may be left at (202) 283-1674 or (202) 283-1292. Students should check for messages during breaks.

SMOKING

Smoking is prohibited in the building. Smokers are asked to use the space provided in the rear courtyard.

HOTEL ACCOMMODATIONS

For hotel availability please call the Treasury Acquisition Institute.

COURSE LOCATIONS

DIRECTIONS TO TAI:

From Virginia: Take 495 North over the Woodrow Wilson Bridge (ending up on the Maryland side). Take Exit 4A to Oxon Hill. Stay in the right-hand lane, the building will be approximately ¼ mile on the right hand side next to the Oxon Hill Home Depot.

From Maryland: Take 495 South (staying on the Maryland side) towards Richmond/Alexandria. Take Exit 4A to Oxon Hill. Stay in the right-hand lane, the building will be approximately ¼ mile on the right hand side next to the Oxon Hill Home Depot.

From Washington: Take 295 South to 95 North towards Baltimore. Take Exit 4A to Oxon Hill. Stay in right-hand lane. The building will be approximately ¼ mile on right hand side next to the Oxon Hill Home Depot.

If lost, please call (202) 283-1674 or (202) 283-1292.

SECTION 3

FY 2005 MONTHLY SCHEDULE OF COURSES

MONTH	DATE	COURSE TITLE
2004		
October	25-29	Contracting Officer's Technical Representative (COTR) Training
November	15-19	Contracting Officer's Technical Representative (COTR) Training
December	6-10	Contracting Officer's Technical Representative (COTR) Training
	14-16	Simplified Acquisition
2005		
January	3-7	CON 100 – Shaping Smart Business Arrangements
	4-6	Performance-Based Service Contracting
	4-7	Federal Contracting Basics
	10-14	Contracting Officer's Technical Representative (COTR) Training
	11-13	Introduction to Business Analysis
	13	FOCUS
	24-27	Advanced Contract Administration
	25-27	7 Habits of Highly Effective People
	25-27	Managing Complex Projects
February	1-3	Managing Information Technology Projects
	1-4	Contract Pricing
	7-11	Contracting Officer's Technical Representative (COTR) Training
	8-10	Software Testing for Better Project Management
	10	Presentation Advantage
	14-17	How to Gather and Document User Requirements
	22-25	Advanced Source Selection
March	1-3	Performance-Based Service Contracting
	4-6	Negotiation Strategies and Techniques
	7-11	Contracting Officer's Technical Representative (COTR) Training
	8-10	Network & Telecommunication Principles for Project Managers
	14-18	Logical Data and Process Modeling
	15-17	7 Habits of Highly Effective People
	18-25	CON 202 – Intermediate Contracting
	21-24	Federal Appropriations Law
	29-30	Leading High-Performing Project Teams
April	4-7	Source Selection: The Best Value Process
	4-8	Contracting Officer's Technical Representative (COTR) Training
	12-13	Workflow Modeling
	15-22	CON 204 – Intermediate Contract Pricing
	19-20	Incentive Contracts
	21	Presentation Advantage
	26-28	Aligning Project Management with Corporate Strategy

FY 2005 MONTHLY SCHEDULE OF COURSES

MONTH	DATE	COURSE TITLE
2005		
May	3-4	GWACs, IDIQ Contracts, and Schedules
	3-5	Performance-Based Service Contracting
	10-12	Introduction to Testing for Business Analysts
	16-20	Contracting Officer's Technical Representative (COTR) Training
	19	FOCUS
	23-27	CON 210 – Government Contract Law
	24-26	7 Habits of Highly Effective People
	24-26	Program Management
June	7-8	Information Technology Contracting
	13-17	Contracting Officer's Technical Representative (COTR) Training
	14-16	7 Habits of Highly Effective People
	20-24	CON 100 – Shaping Smart Business Arrangements
	21-23	Business Analysis for Electronic Commerce
July	11-15	Contracting Officer's Technical Representative (COTR) Training
	12-14	Performance-Based Service Contracting
	18-21	Operating Practices in Contract Administration
August	8-12	Contracting Officer's Technical Representative (COTR) Training

SECTION 4

FY 2005 COURSE OFFERINGS

FY 2005 COURSE OFFERINGS

MANDATORY CONTRACTING COURSES FOR TREASURY 1102 SERIES PERSONNEL

DATE:
January 3 – 7, 2005
June 20 – 24, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
1102 series personnel only – all grades

PREREQUISITE:
This course is for 1102 series personnel only

CON 100 – Shaping Smart Business Arrangements

The ultimate goal of federal acquisition is to deliver and manage business instruments that meet the customer's needs in a timely manner and at a fair and reasonable price. This course begins with the premise that today's contracting professionals are expected to be business leaders and business advisors. That is, they must go beyond knowing the rules of procurement to actually delivering and managing business arrangements in the commercial world in support of the federal customers' needs.

This course helps you develop this mindset by describing the environment and the commercial marketplace in which contract professionals must operate. You will learn key aspects of this business environment, including effective teaming, financing fundamentals, e-business and the commercial marketplace.

DATE:
March 18 – 25, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
1102 series personnel only – all grades

PREREQUISITE:
This course is for 1102 series personnel only

CON 202 - Intermediate Contracting

This course is intended to reinforce and increase the student's knowledge of the principles of contract formation and administration by including both topics in one course. Students who successfully complete this course will be able to accomplish the following based upon statutes, regulations, and sound business judgment:

- Plan for a procurement (including acquisition planning; development of a formal source selection plan based upon an analysis of market research and requirements documents and consideration of recurring requirements; Government property; competition; contract type; and contract financing);
- Create a contract (including preparation of a Request for Proposal, evaluation factors, competitive range determination, discussions, and processing of a request for final proposal revisions) prepare an award decision, conduct debriefings, and take steps to mitigate and/or resolve protests; and
- Administer a contract (including administration planning, conducting a post-award orientation, contract surveillance and quality assurance, financial management, terminations, disputes resolution, and contract closeout).

MANDATORY CONTRACTING COURSES
FOR TREASURY 1102 SERIES PERSONNEL

DATE:
April 15 – 22, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
1102 series personnel only – all grades

PREREQUISITE:
This course is for 1102 series personnel only

CON 204 - Intermediate Contract Pricing

This course reinforces previously learned pricing skills, provides advanced instruction, and concentrates on a primary feature of the contracting process: the determination and presentation of pricing data. The course emphasizes cost and price issues as they relate to the decision making process of each party in a contract situation. Contractor selection and pricing strategies are emphasized. This course assumes that the student has completed a basic or intermediate level pricing course.

DATE:
May 23 – 27, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
1102 series personnel only – all grades

PREREQUISITE:
Suggested: CON 101
(Fundamentals of Contracting)

CON 210 - Government Contract Law

This course provides students with a basic understanding of the laws and principles of law that affect government contracting; various Federal court case studies addressing acquisition issues including ethical consideration; and an understanding of the changes brought forth by recent acquisition statutes and regulations. Topics to be covered include: business ethics; general contract principles; authority and delegation; contract formation; protests; socio-economic statutes; property; fraud; inspection, acceptance, delivery, and warranties; changes; disputes; and terminations.

SPECIALIZED ACQUISITION COURSES
FOR TREASURY PROCUREMENT PERSONNEL

DATE:
January 24 – 27, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

Advanced Contract Administration

Designed to enhance your skills, career and organization, this course presents sophisticated, hands-on instruction. Blending theory, everyday application and proven practices, the course focuses on the most complex aspects of contract administration, including planning, changes, cost monitoring, price adjustments, accounting, past performance, subcontracting, defective pricing, suspension and debarment. The emphasis is on large, traditionally difficult, multi-task contracts, and on the options and responsibilities government and industry administrators have at each key phase.

You will learn new ways of assessing, managing and solving complex administration challenges and issues. Through extensive case studies, exercises and real-world examples, you will receive the advanced management tools necessary for handling difficult administration situations successfully.

DATE:
February 22 – 25, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

Advanced Source Selection

This course is intended for experienced persons who, although familiar with Federal procurement, want to learn more about how to develop effective evaluation criteria and standards, and be able to leverage the benefits of acquisition reform to develop a streamlined source selection process. The course provides you with practical guidance on how to manage source selection from start to finish—requirements definition through debriefings—in accordance with applicable statutes, Federal regulations, and the most recent decisions of the Comptroller General.

Course content is based on the best practices of government and commercial organizations and provides a wealth of relevant examples and materials that will serve as invaluable references after you complete the course. It also provides valuable information on how to write a source selection decision document that will withstand a protest and offers guidance on how to minimize protest risk. The course will provide skills that you can use immediately to maximize the effectiveness of procurement resources.

SPECIALIZED ACQUISITION COURSES
FOR TREASURY PROCUREMENT PERSONNEL

DATE:

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

Contracting for Commercial Products & Services

The Federal Acquisition Streamlining Act (FASA) and the Federal Acquisition Reform Act (FARA) dramatically changed the way Federal agencies contract for commercial items. Using a practical business approach, you will learn the basic policy and procedural changes that resulted from the implementation of FARA and FASA.

In this course you will learn the ramifications of FARA and FASA and how to issue a solicitation for commercial items and award the contract, basing decisions on appropriate considerations. Additionally, you will focus on important contract administration concepts—emanating from unique commercial contracting clauses and practices—that are very different from business-as-usual government practices.

DATE:
February 1 – 4, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

Contract Pricing

Contractors must establish and support their proposed prices in a manner that enables the government to make a determination of price reasonableness. And, from the other side, government personnel must exercise skill in price and cost analysis to support the contracting officer's pricing decision. Mistakes in the process can be costly to all parties concerned.

This course offers you a comprehensive, practical approach to establishing and evaluating prices for government contracts. You will receive thoroughly up-to-date coverage of the Federal Acquisition Streamlining Act of 1994 and the Clinger-Cohen Act on key pricing issues. Plus, you will learn about updates to the Truth in Negotiations Act and the Federal Acquisition Regulation cost principles and about the unique challenges you face when pricing commercial items.

SPECIALIZED ACQUISITION COURSES
FOR TREASURY PROCUREMENT PERSONNEL

DATE:
March 21 – 24, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

Federal Appropriations Law

Under the current administration and Congress, financial pressures are mounting—and will continue to do so in the future. For those who handle Federal funds, finding ways to do more with less is essential.

The subtle rules on the availability of appropriations can block an otherwise well reasoned management plan. These rules are difficult to understand and not well known or publicized. Fortunately there are clear precedents that you can follow to avoid reaching an impasse—and to avoid incurring personal financial liability for failure to comply.

This course takes you through every facet of the budgeting and spending processes. You will get a thorough analysis of all funding activities, as seen through the eyes of the contracting, certifying, and disbursing officers. And you will participate in sessions that explore controlling decisions by the General Accounting Office (GAO).

DATE:
January 4 – 7, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

Federal Contracting Basics

This course is a comprehensive introduction to government contracting, giving you the information you need to understand procurement from start to finish — from contract formation to contract completion. You will analyze key issues fully and receive a clear understanding of their practical application to your everyday job responsibilities. You will learn how Federal contracting really works, how to find solutions to common problems, how to understand the content of key contract documents, and how the Federal Acquisition Regulation (FAR) works.

SPECIALIZED ACQUISITION COURSES
FOR TREASURY PROCUREMENT PERSONNEL

DATE:

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

Government Business Case Development

In this course, the structure and content of a well-prepared business case is provided as a framework for learning, so upon completion of the course you are ready to effectively "sell" a federal government spending proposal or evaluate one. You will learn the principles underlying the OMB's drive to apply the business case process to government investment decisions and the criteria used when scoring a case in order to approve, recycle or reject the spending proposal it supports.

Along with other key topics, the financial requirements of a quality proposal are fully detailed, so you will learn how to accurately estimate and calculate Total Cost of Ownership (TCO), Net Present Value (NPV), Return on Investment (ROI) and other financial metrics required by the OMB. And, you will learn how to address the special added requirements OMB places on information technology business cases.

DATE:
May 3 – 4, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

GWACs, IDIQ, Contracts & Schedules

GWACs are IDIQ contracts for products and services entered into by one Federal agency but available for use by any other Federal agencies and some federal contractors. Rapidly proliferating for the procurement of information technology, there are at least 30 GWAC programs now in place. About fourteen of these, such as the Department of Transportation Information Technology Omnibus Procurement II (ITOP II) and the National Institutes of Health Electronic Computer Store each account for purchases estimated at between $100 million and $2.9 billion annually.

You will analyze the ways GWACS are awarded and used and discuss issues such as: source selection, ordering procedures, pricing, and contract administration. The course also provides a summary of the rules applicable to MAS contracts and the new simplified acquisition rules for open-market purchases up to $5 million.

SPECIALIZED ACQUISITION COURSES FOR TREASURY PROCUREMENT PERSONNEL

DATE:
April 19 – 20, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

Incentive Contracts

Incentive contracts can be used to motivate the government contractor to control costs and strive for outstanding technical and/or schedule performance. At their best, incentive contracts provide the foundation on which to build win-win outcomes for buyer and seller. Proper selection of contract vehicle and structuring of related incentives minimizes common problems such as: cost overruns, schedule delays and failure to achieve expected results. At their worst, incentive contracts can spell disaster for both buyer and seller when selected inappropriately, structured poorly or administered ineffectively.

The focus of this course is to provide both parties with a comprehensive understanding of the decisions to be made when using incentive contracts, and the likely consequences associated with those decisions. It also shows how best to optimize performance, minimize costs and motivate delivery.

DATE:
June 7 – 8, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

Information Technology Contracting

In this course, you will learn the essential techniques for successfully researching, planning, evaluating and managing IT acquisitions. Discover the most effective and efficient means for developing IT requirements and structuring solicitations that meet organizational objectives and ensure results. Learn how new commercial item acquisition procedures can help you streamline the acquisition process, reduce procurement cycle times and leverage off-the-shelf products, services and business practices. Learn the key principles of effective IT contract management — from developing effective terms and conditions to managing the contract change process to monitoring contractor compliance to cost, schedule and performance requirements.

This course will help you obtain a clear understanding of the information technology acquisition process. Through classroom exercises and case study analysis, you will receive an assortment of practical IT acquisition tools and techniques that can be immediately applied back on the job.

SPECIALIZED ACQUISITION COURSES
FOR TREASURY PROCUREMENT PERSONNEL

DATE:
March 1 – 4, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

Negotiation Strategies & Techniques

A vital skill needed in procurement is the ability to negotiate effectively. Almost every level of contracting involves negotiations, in a wide range of settings, over small and large issues. This course provides you with a solid battery of strategies, tactics, and skills that are effective in contract formation and contract administration negotiations. Every key phase of the negotiation process, from start to finish, is covered in this dynamic course.

This course also recognizes that how you negotiate depends greatly on your personality and individual style. In-class exercises will provide you with insights into your negotiation style and personal techniques. Then, to enable you to learn by doing, you will perform a series of increasingly challenging negotiations. These videotaped sessions will give you immediate feedback on your negotiation style and skills and invaluable experience in putting theory into practice. The new skills you gain from this course can be immediately applied to other contracting situations where formal and informal negotiations of all dimensions take place.

DATE:
July 18 – 21, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

Operating Practices in Contract Administration

Just as a chain is only as strong as its weakest link, a contract can be only as strong, as successful, as its administration. In this highly practical course, you will address all aspects of effective contract administration—from initial award to final closeout. Special emphasis will be given to successful administration of contracts: problem avoidance, day-to-day operating practices, performance monitoring systems, early detection and correction of non-performance, payment, contract modifications, and working relationships. In addition, you will learn proven practices for getting contracts off to a solid start, keeping them on track, and handling every problem that arises.

SPECIALIZED ACQUISITION COURSES FOR TREASURY PROCUREMENT PERSONNEL

DATE:
January 4 – 6, 2005
March 1 – 3, 2005
May 3 – 5, 2005
July 12 – 14, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

Performance-Based Service Contracting

This course demonstrates how to lay a solid foundation for any service contract by establishing a sound performance-based approach from the start. You'll learn the critical steps to take in procurement planning and request for proposals preparation to implement the performance-based approach. Emphasizing preparation of a performance-based work statement, the course focuses on use of draft solicitations; team development of the work breakdown structure and task identifications; conversion of cost-plus requirements to fixed-price; use of incentives, deductions, and penalties in connection with performance goals; and application of specific cost and performance measurement techniques, quality assurance surveillance plans, and quality-related evaluation factors. You'll learn to incorporate proven best practices in performance-based service contracting, and you'll tackle issues in a hands-on environment emphasizing real-life, in-the-workplace skills.

DATE:
December 14 – 16, 2004

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

Simplified Acquisition

The Federal Acquisition Streamlining Act of 1994 (FASA) made key changes in the way Federal agencies conduct their simplified acquisitions (previously called "small purchases").

This course provides in-depth, up-to-the-minute coverage on the full range of small purchase policies and procedures, including the revised Federal Acquisition Regulation (FAR) language. In addition to explaining the many changes that have occurred in the simplified acquisition area, the course also emphasizes the well-established rules that have not changed with FASA, such as compliance with FAR Part 8, required source of supply, the regulatory prohibition against splitting orders, and contract reporting.

SPECIALIZED ACQUISITION COURSES
FOR TREASURY PROCUREMENT PERSONNEL

DATE:
April 4 – 7, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

Source Selection: The Best Value Process

One of the most critical steps facing agencies and contractors in government contracting is source selection—the process agencies follow to choose among competing proposals. In response to demands for improvements in the quality of supplies and services, Federal agencies are increasingly using best-value criteria to award contracts. While the process gives agencies great latitude, the procedures are demanding of agency personnel and competing offerors. In addition, the rules give you little guidance on how best to select evaluation factors and evaluate proposals.

Through lectures and comprehensive case studies, this hands-on course will provide you with a number of major benefits, including a solid understanding of what the rules mean and skill training on the principles and processes of sound business decision analysis and decision-making.

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BUSINESS ANALYSIS COURSES
FOR TREASURY PROCUREMENT PERSONNEL

DATE:
June 21 – 23, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

Business Analysis for Electronic Commerce

The success of e-commerce business ventures depends on making key decisions in an environment that involves rapid development cycles, fuzzier requirements, and technology that changes almost every day. The business analyst can play a key role in e-commerce projects by assisting the project team in identifying the essential requirements at each phase in an evolutionary business solution process. In order to do this, the business analyst must understand the difference between e-commerce projects and other business projects.

This hands-on course begins with an overview of e-commerce. This foundation is then used to identify how an e-commerce technology project differs from other projects and how the role of the business analyst changes.

DATE:
February 14 – 17, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

How to Gather & Document User Requirements

Incomplete requirements are often cited as the number-one reason projects or systems fail. Accurately defining the requirements and staying on course from the beginning is key to success in today's business world.

This "how-to" course introduces the roles of the business analyst as they relate to the analysis and documentation of requirements. It familiarizes participants with core knowledge and skills required to analyze and document user requirements. It also identifies how these requirements are defined and managed throughout the life cycle.

BUSINESS ANALYSIS COURSES
FOR TREASURY PROCUREMENT PERSONNEL

DATE:
January 11 – 13, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

Introduction to Business Analysis

This course is designed to give people new to the business analyst role or those who supervise and/or work with business analysts a basic understanding of the functions and business impact of this role. The course provides a special focus on business analysis functions as they relate to the development of information technology solutions. This understanding is essential for any business analyst supporting any business area given the impact of information technology in today's business environment.

After completing this course, you will have established a working vocabulary to enable you to communicate effectively with those who perform the business analyst role. In addition, you will have built the framework necessary to support more in-depth skill development.

DATE:
May 10 – 12, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

Introduction to Testing for Business Analysts

Failure to develop a plan to test the right things at the right time can result in cost overruns, missed completion dates, undetected errors and dissatisfaction among customers and users.

In this course, you will learn to use test plans effectively, with a focus on differentiating the roles of verification and validation in achieving quality. Verification and validation comprise the backbone of test plans. The tasks involved are critical, in particular reviews, inspections, testing and demonstrations—all of which are covered in this course. You will help develop a test plan and write and review test cases at the business level.

This course focuses on approaches used in software development from the viewpoint of the business analyst. However, the foundations of these techniques are applicable to other disciplines.

DATE:
March 14 – 18, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

Logical Data & Process Modeling

In today's complex business environment, integration of multiple functional areas combined with fuzzy requirements is a fact of life - a picture can be worth a thousand words. The technique of logical data and process modeling focuses on presenting a complete picture of the important requirements of the business (and the related project) through significant user involvement in the analysis phase.

This course offers a complete education on the techniques used to effectively analyze any business function (referred to as a "business area") and to create logical data and process models. Participants will look at business rules, policies and procedures without being limited by current technology or organizational structure.

DATE:
April 12 – 13, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

Workflow Modeling

To develop a complete picture of the important requirements to support the business, the next critical step is documenting the workflow of the business area as it currently exists. Only then can you move forward to design the solution to support the business needs. The workflow model uses the Logical Process Model to diagram each process as a workflow. This step will enable you to discover and address any unstated requirements prior to finalizing the project plan. The workflow diagrams are key to effective analysis and communication.

This course presents techniques for modeling the workflow of a business area. Participants will learn to construct flowcharts of current operating procedures and look for areas of improvement. You will leave prepared to use these tools to describe the "as is state" of a business and move to the "to be state" of the solution.

PERSONAL DEVELOPMENT COURSES
FOR TREASURY PROCUREMENT PERSONNEL

DATES: January 13, 2005 May 19, 2005 **LOCATION:** TAI – Oxon Hill, MD See page 5 for details **COURSE FORMAT:** Lecture, discussion and practical exercises **AUDIENCE:** All acquisition personnel **PREREQUISITE:** None	**FOCUS: Achieving Your Highest Priorities** The *Focus* workshop presents an engaging and inspirational learning experience and will change your life in ways you never thought possible. In this workshop, you will begin a process and journey to a new way of thinking about personal and professional focus and accomplishment. You will learn how to identify -- and focus -- on the tasks and priorities that matter most so that you can deliver maximum results every day. You will learn to turn the things you have to do into the things you want to do.
DATES: February 10, 2005 April 21, 2005 **LOCATION:** TAI – Oxon Hill, MD See page 5 for details **COURSE FORMAT:** Lecture, discussion and practical exercises **AUDIENCE:** All acquisition personnel **PREREQUISITE:** None	**Presentation Advantage** Presenting is a valuable and powerful skill that everyone can learn with the right training. In this seminar, you will learn how to design and plan presentations that capture an audience's attention, and how to deliver key concepts with power, confidence and enthusiasm. In addition, you will learn to turn presentation anxiety into confidence and how to give dynamic, effective presentations with power and professionalism!

PERSONAL DEVELOPMENT COURSES FOR TREASURY PROCUREMENT PERSONNEL

DATES:
January 25 – 27, 2005
March 15 – 17, 2005
May 24 – 26, 2005
June 14 – 16, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

The Seven Habits of Highly Effective People

This course teaches the seven habits of highly effective people and discusses the relevance of each of the habits to work and personal life. In addition, this course demonstrates tips, techniques, and strategies for implementing each of the seven habits to improve performance.

PROJECT MANAGEMENT COURSES
FOR TREASURY PROCUREMENT PERSONNEL

DATE:
February 1 - 3, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

Managing Information Technology Projects

Today's IT projects present unique challenges to the project manager requiring coordination with many stakeholders and integration of various technological capabilities. In this course you will discover critical success factors and hidden risks inherent in IT projects.

This course addresses all areas of IT project management: hardware, software, systems integration, and human resources. In addition, the course addresses the role of the project manager at each phase of the project life cycle and helps you to gain the foundation, experience, techniques and tools to manage each stage of your project. You will learn techniques to set goals tied directly to stakeholder needs, get the most from your project management team and utilize project management tools to get work done on time and within budget.

DATE:
March 8 – 10, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

Network & Telecommunication Principles for Project Managers

The proliferation of networking systems is forcing IT project managers to learn about voice and data networks on the fly. A growing global economy is making unprecedented demands of organizations' data communications capabilities. Project managers must understand and converse intelligently with project team members, vendors, and customers to understand and meet requirements.

In this course, you will learn the fundamental principles in data networks with an emphasis on incorporating communication capabilities in information systems design. Learn how network and telecommunications technologies are evolving and how communications systems function and integrate with existing architectures. Explore how standards apply to networks and which constraints influence the design and implementation of network and telecommunications projects. In this course, you will get the background you need to identify and handle the risks, constraints, resourcing, and scheduling aspects of network and telecommunications projects.

PROJECT MANAGEMENT COURSES
FOR TREASURY PROCUREMENT PERSONNEL

DATE:
February 8 – 10, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

Software Testing For Better Project Management

Many organizations wait until late in the development cycle to test new software and often limit testing due to time constraints. This approach can create pain for the project manager in the form of cost overruns, missed completion dates, overlooked requirements, undetected errors and dissatisfaction among customers and users.

In this course, you will discover why and how to integrate testing throughout the software development process in order to uncover bugs, ensure performance, enhance quality and lower costs. Using a set of integrated classroom exercises beginning with requirements validation and ending with implementation, this course demonstrates how management of testing activities relates to the life cycle of projects involving software development of projects. Gain the necessary insight and training to develop, document and execute a project plan that incorporates an ongoing software testing program. Get specific tools to enable you to plan for and assess test results.

ADVANCED PROJECT MANAGEMENT COURSES FOR TREASURY PROCUREMENT PERSONNEL

DATE:
April 26 – 28, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel with experience in Project Management

PREREQUISITE:
None

Aligning Project Management with Corporate Strategy

Today's business climate is characterized by unprecedented changes in technology and globalization, as well as by complex business relationships and the unrelenting drive for competitive success. In this highly stressful environment, it is essential for project managers to think and act strategically.

This course gives you an in-depth analysis of the process leading from business strategy formation to portfolio development to the project and project manager's role. Learn how to link your project to the business strategy, apply and maintain alignment of the project strategy, and manage the expectations and interests of those who have a stake in the project outcome. You will get expert guidance on how to select strategies for project success in light of your corporate strategy.

DATE:
March 29 – 30, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel with experience in Project Management

PREREQUISITE:
None

Leading High Performance Project Teams

Teams make decisions every day, and they deal with dilemmas and unplanned events that must be resolved within specified times, budgets and other parameters. That fact forms the basis of this fast-paced, highly engaging workplace simulation. Project managers who have completed this simulation tell us they have two breakthrough insights, that shatter myths and result in significant benefits to themselves and their organizations.

In this course, two myths are deflated: Myth #1. Leaders are born, not made. Myth #2. A team is composed of a leader and followers. With these two myths deflated, the way is cleared for you to practice leading and working in teams, two essential skills for success in managing projects. This simulation enables you to integrate and apply the five practices of exemplary leaders and eight dimensions of high-performing teams, becoming a confident and competent leader!

ADVANCED PROJECT MANAGEMENT COURSES FOR TREASURY PROCUREMENT PERSONNEL

DATE:
January 25 – 27, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

Managing Complex Projects

Have you ever taken on a project that appeared just too complex to handle? Just trying to identify the multitude of variables to be managed, let alone to anticipate how they might interact to create unexpected challenges, can be overwhelming. So how do you determine the true complexity, with a clear understanding of the variables involved and move forward to develop a plan that provides the right level of control and flexibility for success?

To manage the complex project requires a new way of thinking—a new approach to applying known project management techniques and tools. This course provides a systematic approach to assess project complexity and to deploy the best approaches and techniques to achieve success. The heart of the course is a progressive, integrated case study that gives you hands-on experience in determining the true level of project complexity, governing the use of complexity to assist rather than hinder progress, and to lead the project team from a new perspective.

DATE:
May 24 – 26, 2005

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
All acquisition personnel

PREREQUISITE:
None

Program Management

Program managers are, above all else, change agents. Their role has evolved in most organizations from that of managing multiple projects, to implementing business strategy through an integrated portfolio of projects involving the management of multiple teams of professionals, as well as executive-level stakeholders. As such, the program manager today requires a refined set of business and leadership skills that are vastly different from that of a project manager.

In this course, you will learn how to succeed as a program manager by focusing on what makes program managers successful. Success is not based on technical competence; rather, it is business savvy, leadership and communication skills that separate the winners from the losers. This course provides a set of practical tools and techniques designed to get you up to speed quickly on these issues, thus negating the need for theory-based lecture and time-wasting and elementary "exercises."

ADVANCED PROJECT MANAGEMENT COURSES FOR TREASURY PROCUREMENT PERSONNEL

DATE: **LOCATION:** TAI – Oxon Hill, MD See page 5 for details **COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises **AUDIENCE:** All acquisition personnel **PREREQUISITE:** None	**Rapid Assessment & Recovery of Troubled Projects** If you're a project manager who is in the trenches every day, sooner or later you will be staring in the face of a struggling project. The project may be your own or may have been one you inherited. Knowing what to do when the time comes will be critical to your success. You will need to take action immediately-with speed, accuracy, power, balance and focus. You will have little time to think about an approach or polish your skills. This course demonstrates a proven process to project recovery. You will get everything you need (process, tools, techniques) to perform a rapid assessment of a project in trouble, develop a solid recovery plan and manage the transition to stability. In this course, you will experience what to do step by step, using seven key metrics as your guide to success. Active participation in the case study, designed to simulate the environment and feel of an actual troubled project, will enable you to build your skills in a meaningful way.

MANDATORY BASIC TRAINING COURSE
FOR TREASURY COTRS

DATES:

Oct 25 – 29, 2004	Apr 4 – 8, 2005
Nov 15 – 19, 2004	May 16 – 20, 2005
Dec 6 – 10, 2004	Jun 13 – 17, 2005
Jan 10 – 14, 2005	Jul 11 – 15, 2005
Feb 7 – 11, 2005	Aug 8– 12, 2005
Mar 7 – 11, 2005	

LOCATION:
TAI – Oxon Hill, MD
See page 5 for details

COURSE FORMAT:
Lecture, discussion, case studies, and practical exercises

AUDIENCE:
Personnel who are preparing to work as a COTR

PREREQUISITE:
None

Contracting Officer's Technical Representative (COTR) Training

The complexity of Federal contracting continues to increase every year. Contracting Officer's Technical Representatives (COTRs) are technical employees who perform contract-related duties and play a vital role in acquiring goods and services for the Government. In addition, COTRs play a critical role in ensuring that contracting is conducted in an effective and efficient manner that meets the public's interest. COTRs have many responsibilities including, but not limited to, participating in acquisition planning and market research; developing specifications and work statements; evaluating offers and assisting in source selection; and monitoring and evaluating contractor performance.

This course covers all material current with the most recent regulation and policy changes as it relates to COTRs including, but not limited to:

- Roles, responsibilities and authority in the federal acquisition process
- Policies, regulations and laws related to federal acquisitions
- Acquisition planning, contract formation, contract management and contract administration processes including contract closeout
- Market Research
- Writing contract specifications and work statements
- Evaluation planning, source selection and review of bids/proposals
- Monitoring contract/contractor performance
- Procurement ethics
- Performance Based Contracting
- Competitive Sourcing
- Treasury and IRS Contractor Background Investigation requirements

SECTION 5

TRAINING REGISTRATION FORM

PLEASE FILL OUT THE FOLLOWING INFORMATION COMPLETELY:

NAME: _____

SEID: _____ *(IRS Employees Only…*__*Mandatory Field!*__

SEID can be obtained in the Discovery Directory on the IRWeb.
Please be sure to select "All available information" when performing your name search.)

➤➤ **EMAIL ADDRESS:** _____ ◀◀

TITLE: _____ **SERIES/GRADE:** _____

In case of emergency, please notify: _____ *(Name/Number)*

Supervisor's Name/Phone: _____

➤➤ **SUPERVISOR'S SIGNATURE:** _____ ◀◀

ORGANIZATION: _____ *(If IRS please enter office symbols)*

WORK PHONE #: _____ **HOME PHONE #:** _____

FAX PHONE #: _____

COURSE TITLE: _____

DATE OF COURSE: _____

ALTERNATE DATE IF CLASS IS FULL: _____

TO REGISTER: **COMPLETE THE ABOVE INFORMATION AND HAVE YOUR SUPERVISOR SIGN.**
MAIL OR FAX TO DIANA ALLISON AT TAI (address above) FAX #: (202) 283-1130

TAI Cancellation Policy:

✔

If TAI has to cancel a course for administrative reasons, we will make every effort to notify all confirmed participants. When we contact you, we will be happy to discuss enrolling you in a future session.

AGENCY PROJECT NUMBER

Student Withdrawal Policy:

If you are unable to attend a class for which you are confirmed, send us a note with your supervisor's signature two weeks before the class starts date.

Reasonable Accommodations:

If you have special needs, please list them here: (i.e. interpreter)

TAI Staff

Nick Nayak	M. Sylvia Ball	Jodi Stark
Program Manager	Asst. Program Manager	Procurement Analyst
(202) 283-0983	(202) 283-1675	(202) 283-6970
Diana Allison	Shonda Yates	Donald Guy
Management Analyst	Management Analyst	Management Analyst
(202) 283-1674	(202) 283-1372	(202) 283-1292

CONFIRMATION INFORMATION: (For TAI Staff Use Only)

The following information has been confirmed for your class unless otherwise notified by a member of the TAI Staff

Course Time:

_____ .

Course Location: TAI, Constellation Centre
Oxon Hill, MD

☐ **1ˢᵗ Floor: Room #_____**
☐ **7ᵗʰ Floor: Room #_____**
Location is subject to change

TAI Staff Approval:

_____ .

Initial Here